Quicken Direct Connect

INSTALLATION GUIDE – **Personal Online Banking**

Dime Community Bank

Quicken Direct Connect Instructions

Prior to Changing the Online Services to Dime Personal Online Banking:

1. Backup your Quicken Windows Data File. Go to **File > Backup and Restore > Backup Quicken**
2. Download the latest Quicken Update. Go to **Help > Check for Updates**.
3. Complete a final transaction download. Accept all new transactions into the appropriate registers.
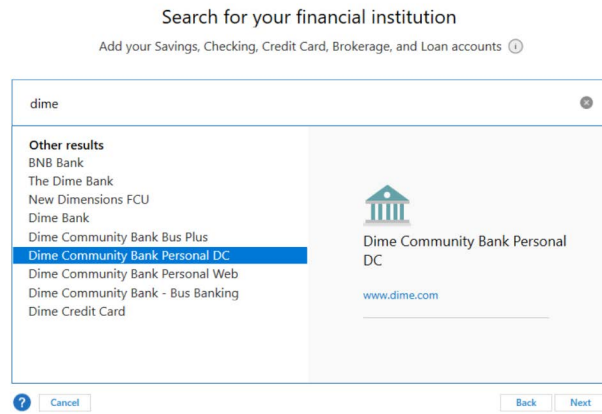
For current Quicken Windows Direct Connect Customers:

1) Deactivate the current online banking connection for the accounts that you would like to connect to Dime Community Bank.
   a) Choose **Tools > Account List.**
   b) Click **Edit** on the account to deactivate.
   c) In Account Details, click **Online Services**.
   d) Click **Deactivate**. Follow prompts to confirm deactivation.
   e) Click the **General** tab.
   f) Delete Financial Institution and Account Number information. Click **OK** to close window.
   g) Repeat steps for any additional accounts that apply.

2) Reconnect the online banking connection for your accounts.
   a) Choose **Tools > Account List**.
   b) Click **Edit** on the account you want to activate.
   c) In Account Details, click **Online Services** and then choose **Set Up Now.**
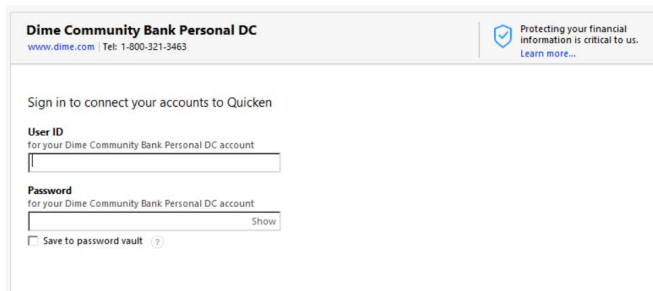   d) Type your institution's name in the search field and click **Next**.
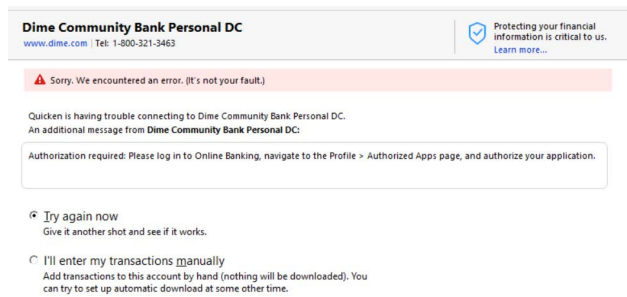
DIME

e) Select Dime Community Bank Personal DC

Search for your financial institution

Add your Savings, Checking, Credit Card, Brokerage, and Loan accounts ⓘ

| dime | ⊗ |

Other results
BNB Bank
The Dime Bank
New Dimensions FCU
Dime Bank
Dime Community Bank Bus Plus
Dime Community Bank Personal DC
Dime Community Bank Personal Web
Dime Community Bank - Bus Banking
Dime Credit Card

Dime Community Bank Personal DC

www.dime.com

❓ Cancel   Back   Next

f) Enter your Dime Personal Online Banking Credentials

Dime Community Bank Personal DC
www.dime.com | Tel: 1-800-321-3463

Protecting your financial
information is critical to us.
Learn more...

Sign in to connect your accounts to Quicken

User ID
for your Dime Community Bank Personal DC account

Password
for your Dime Community Bank Personal DC account

Show

☐ Save to password vault ❓

![DIME logo]
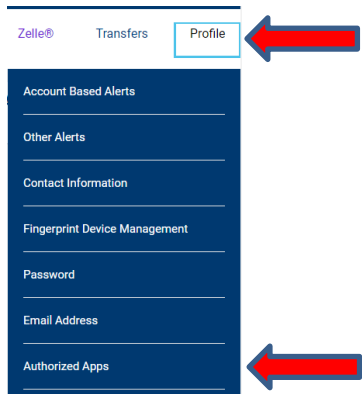
g) Upon your first login, the system will produce an error message indicating that your profile needs to be authorized.
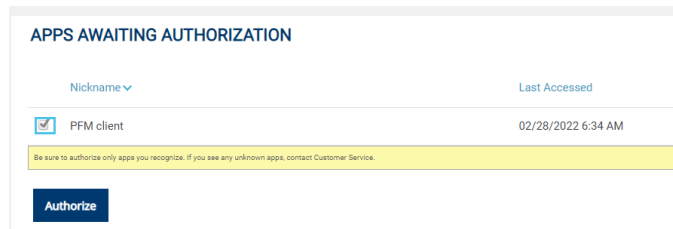

h) To enable the service login to Dime Personal Online Banking, go to Profile and Authorized Apps.

WINDOWS SETUP

i) Under Apps Awaiting Authorization, select the box next to PRM Client and click Authorize.

j) Return to the Quicken screen to enter your online banking credentials and click Connect.

k) Ensure you associate the accounts to the appropriate accounts already listed in Quicken.

   i) Select **Link to an existing account** and select the matching accounts in the drop-down menu.

   ii) **Important: Do NOT choose "Create a new account" unless you intend to add a new account to Quicken**. If you are presented with accounts, you do not want to track in this data file, choose **Ignore – Don't Download into Quicken** or click **Cancel**.

l) After all accounts have been matched, click **Next** and then **Done**.